Mic Drop:

The Volatility of Employment and Income for Professional Musicians Before and During the COVID-19 Pandemic

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ABSTRACT

This paper finds that musicians have more variable work schedules than comparable gig occupations and they are typically more disadvantaged in finding suitable employment opportunities: they rely on gigs but are not always able to find them consistently. They are more likely to be self-employed and face the challenges that comes with that status, like scheduling one's own work opportunities and providing one's own health insurance. They also often work part-time due to the nature of the profession and the music industry, or take on multiple jobs to financially sustain themselves and their families financially. Musicians seem to have less financial freedom, often living in residences with more than two families in them. The pandemic has caused already-low hours for musicians to decrease further, still not fully recovering since the initial shutdown due to the cancellation of all live performances and other in-person work opportunities. They also have not had the same ability to work remotely as similar gig occupations. These economic detriments have been accumulating for years as a result of the unstable music industry and the effects have multiplied as a result of the unforeseeable COVID-19 pandemic, leaving musicians searching for a way forward within the broken system.

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INTRODUCTION

The music industry is evolving exponentially in response to new technological and legislative changes and the current state of the music industry seems caught up in uncertainty around these recent renovations. The streaming era especially does not seem to be sustainable for small or independent music artists across a wide variety of genres and occupations within the industry. The income of gig musicians has become increasingly dependent upon live performance which evokes the temporality around employment that relies on irregularly scheduled events, rather than dependable, salaried income.

Now, the world has been disrupted by the COVID-19 pandemic in so many ways. Musicians, without live performance, must adapt and tackle the economic insufficiency of surviving solely off of solely streaming revenue, secondary employment, working in the gig economy, or grants, while competing in an already saturated, overly competitive industry where payoff and recognition are scarce. Economically speaking, the current state of the music industry is not sustainable for the population of workers that call themselves 'musicians.' At the same time, technological innovation and ease of access to music creation resources and production equipment are fostering an immense wave of artists entering the music business. As the demand for new music increases with the exponential growth of the user base of music streaming services such as Spotify, Apple Music, and TIDAL, the supply of digital music is getting increasingly saturated and the opportunity to earn a living wage as a musical artist is becoming much harder to come by.

Regardless of the pandemic, musicians are already operating in a uniquely difficult industry. Opportunities are harder to come by, compensation isn't fair, and instability runs rampant. The occupation of a musician is much more volatile and unstable than many others, even compared to other occupations that similarly rely on gig work, like visual artists or construction workers.

This paper examines how musicians are navigating the constantly transforming music industry, especially given the difficulty finding a path forward in the current pandemic, without the same opportunities for employment and earning income because of the absence of live performance and the concurrent economic downturn. First, demographics of musicians and the consumption of live music must be considered in order to identify the varying backgrounds of musicians and to better understand the landscape and demand for live music. Then, an analysis of employment is done, especially the secondary employment of musicians, who must forge their own path within an industry where wages and salaried work are uncommon and gig work is not reliable. Also, the frequent self-employment of musicians is analyzed, as many must control their own output and work schedule as independent workers. Additionally, the income of musicians is examined, by inspecting revenue streams of music-related income in order to understand the scope of earnings and examine the volatility of receiving music-related income from a fractured structure. This analysis examines musicians' employment, income, and economic conditions over the past few years using data from the Consumer Population Survey (CPS) and the Annual Social and Economic Supplement (ASEC). Using previous literature, past surveys and reports, and original data analysis, this paper uncovers some insight into the volatility of the employment and income of professional musicians, before and during the COVID-19 pandemic. As anticipated, it seems as though musicians are at an unusually disadvantaged position in both finding and maintaining employment and income-earning opportunities.

BACKGROUND

Musicians have always had to struggle to survive, navigating the unreliability of the profession since the invention of recorded music. The invention of the phonograph left performers feeling threatened, realizing that recorded music would be able to substitute the demand for live performance by providing a means to listen to music from the comfort of one's own home. In 1906, composer John Philip Sousa anticipated that "when music can be heard in homes without the labor of study… it will be simply a question of time when the amateur disappears entirely" (Katz 2010, p. 76). Also, these venues for social gatherings like bars or restaurants could buy a music player like a jukebox, referred to as an "Automatic Entertainer" by inventor John Gabel in 1906, instead of hiring live performers. Obviously, this change in the industry was not as catastrophic as forecasted.

More recently, digitally recorded music threatened musicians' livelihoods by providing a cheaper alternative for the consumption of physical albums. Listeners could now purchase single songs instead of the whole album, and Apple's fees charged on the iTunes Store, stacked on top of the musician's label fees, could leave an artist with less than 10% of the cut from digital songs (Tracy 2021). Both musicians that rely upon physical album sales and performing musicians who rely upon live performance felt like they could be affected by this shift towards the seamless accessibility of digital music.

Now, streaming throws another wrench into the music industry machine. Musicians who put their music on streaming services like Spotify, Apple Music, and Amazon Music only receive a fraction of a penny per stream. The payout from streaming services comes in the form of mechanical royalties, public performance royalties, and payout from copyright ownership of the sound recording. Musicians only earn portions of these forms of payment, as publishers and any other songwriters take cuts from the former two and the artists' label and management take big cuts from the latter (Pastukhov 2019). This payout structure is similar to the sale of digital music on platforms like iTunes before streaming; however, it becomes unclear whether this is enough to compensate artists who would have been receiving money from album purchases. If Spotify, for example, the largest streaming service with over 140 million paid subscribers and 300 total monthly active users globally, only pays $0.00318 per stream on average (Pastukhov 2019), it could take hundreds or even thousands of streams for an artist to make the same amount as a single album purchase. This streaming volume is very unlikely to come from an individual with the increasing passive listenership in music, with thousands of other different artists readily available to listeners because of the ease of access provided by these streaming services.

Daniel Ek, CEO of Spotify, recently addressed the controversy surrounding low streaming royalties paid out to artists through the Spotify streaming platform. What Ek says is true but comes off as insensitive, as well as economically invalid: "Some artists that used to do well in the past may not do well in this future landscape where you can't record music once every three to four years and think that's going to be enough" (Darville 2020). Simply telling musicians to dedicate more time towards producing music more frequently is not a realistic expectation and fails to address the other issues at hand. Ek is asking musicians to increase their input towards their work which further increases associated costs, which may result in diminishing marginal returns since this extra effort may not increase their revenue by enough to make it worthwhile.

Pursuing a career in music is already risky enough, but the pandemic presents an obstacle never before seen in the music industry, as Sarah Goldstone recognizes: "Musicians are already used to hustling so hard, and always defending their life choice […] It's not a group of people who are shocked to have to make it work. But no one could have seen this coming" (Cush 2020).

Without live performances and accompanying revenue streams like ticket and merchandise sales, many musicians, especially smaller artists that specialize in popular music genres, are now struggling to make a living wage in music.

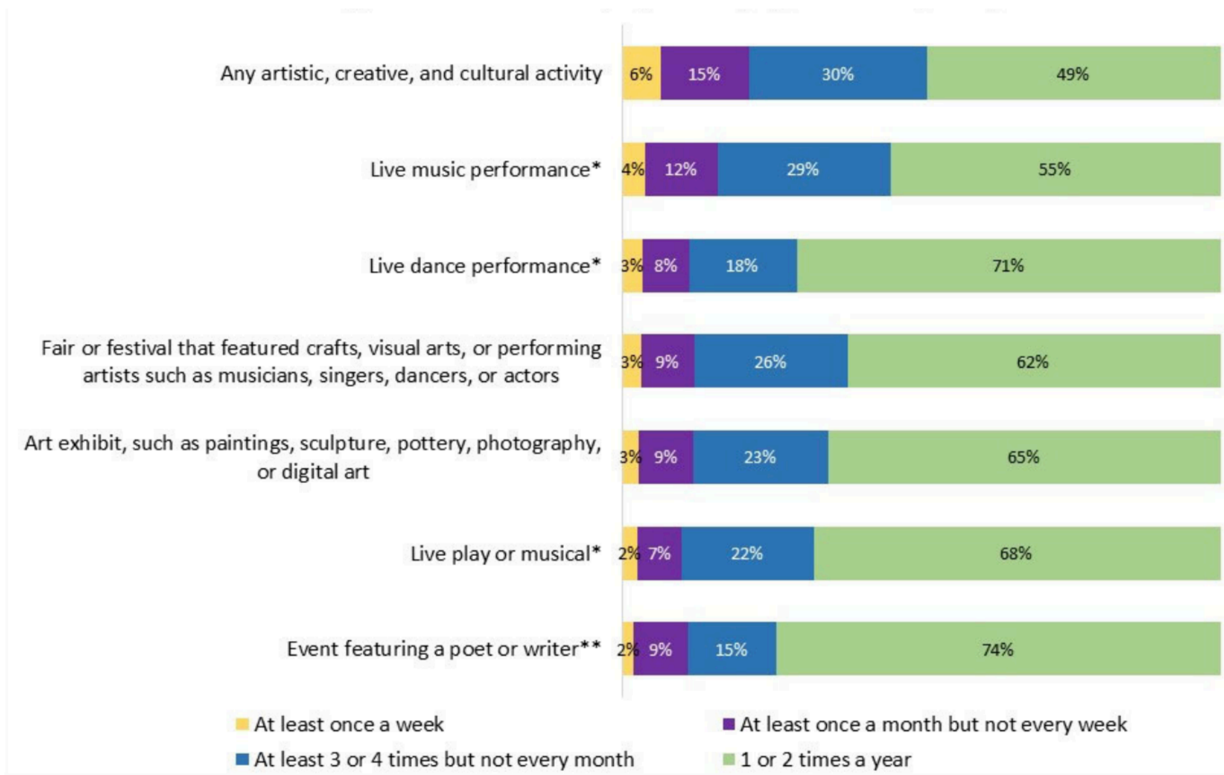
LITERATURE REVIEW

This section first explores the consumption of live music and the public's participation in music and the arts, showing how consumer habits affect the ways in which musicians find opportunities to work. Next, the demographics of working musicians are analyzed. The music industry is majority white males, especially in genres like classical and rock, raising the issue of whether women and musicians of color could face more difficulty in finding employment opportunities and sources of income within the industry. Additionally, understanding the education levels of professional musicians is important for predicting how musicians will look for secondary employment and for interpreting the limited range of job possibilities for employment of those without a college degree. Next, employment of musicians will be observed, noting whether self-employment is economically sustainable for musicians and how prevalent part-time or gig work is for occupational musicians, having learned about the demographics of musicians and having a stronger background in the structure of the music industry. Lastly, revenue streams of musicians are analyzed and income inequality within the music industry is observed.

Consumption & Participation

In terms of consumption of music-related goods and services, the Census Bureau and the National Endowment for the Arts put out the Survey of Public Participation in the Arts (SPPA) in 2017, which recorded the patterns in adult participation in the arts, whether as a consumer or producer. Among those surveyed, 42% of adults attended at least one live music performance in the past 12 months, indicating how integral live performance is in American society. If almost half of adults, millions of Americans, are interested in engaging with the music community, the absence of live performance during the pandemic completely closes off this market. Not surprisingly, the younger generations seem to be more actively engaged in the consumption of live performance, as 53.2% of 18-to-24-year-olds indicated attending a live musical performance. White Americans showed the highest rate of consuming live music, with 47.8% of white Americans surveyed attending a live music performance in the last year, compared to 30.2% of black Americans, 29.8% of Hispanics, and 32.9% of Asian Americans (NEA 2017).

Percentage of U.S. adults who attended artistic, creative, or cultural activities during the last 12 months, by activity type and frequency: 2017



* Includes professional, community, or student musicians/performers
**Examples of 'event featuring a poet or writer' include book signing, readings, or poetry slams
Source: National Endowment for the Arts, 2017 Survey of Public Participation in the Arts, Core 2.

Frequency of attendance is also important to analyze the consumption habits of live music performance of the general adult American public. Of those who indicated attending a live music performance in the past 12 months, 4% went at least once a week, 12% indicated attending live music performances at least once a month, 29% indicated attending a live performance 3-4 times per year, and 55% reported only attending 1-2 times per year. The 45% of Americans who attended live music performances more than once or twice a year was the highest proportion among all other live artistic performances including live dance performance (29%), performing or visual arts fair or festival (38%), art exhibit (35%), live play or musical (32%) (NEA 2017).

To get an idea of where occupational gig musicians are working, the SPPA also asked what type of venues that the music consumers surveyed had attended and 63% answered going to a 'theatre, concert hall, or auditorium,' 60% attended at a park or open-air facility, 43% saw the performance at a restaurant, bar, nightclub, or coffee shop, 32% saw the performance at a place of worship, and 23% attended at a college or university campus (NEA 2017).

Many consumers of music also created music themselves. Among artistic participants who had sung, performed, created music, danced, or acted over the past 12 months, many reported performing within a private home, but public performances were mostly concentrated in places of worship (40%). Other venues are more indicative of professional musical performances: 24% performed in restaurants, bars, nightclubs, or coffee shops, and 13% performed in a theater, concert hall, or auditorium (NEA 2017). Relying on other performers also makes the profession more volatile, with less independence and flexibility as would be imagined for many solo musicians. Among adults who performed music, 36% said that they'd done so with a group or at least one other performer with a musical instrument, and specifically, 30% of singers reported singing with a partner or others as part of a music group (NEA 2017).

Understanding the variance in venues where musicians publicly perform helps convey how musicians must often find multiple sources of income, relying on multiple gigs or even occupations to maintain a living wage.

Demographics of Musicians

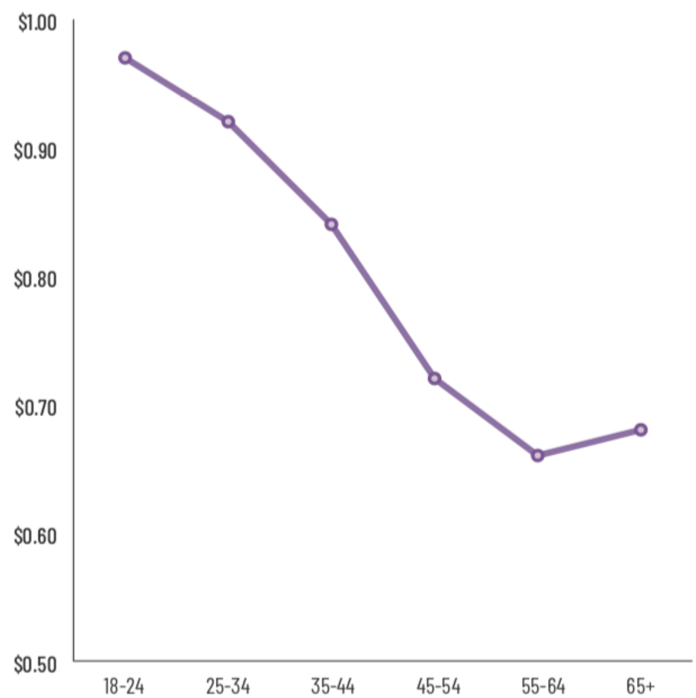
The occupation of ‘musician’ encompasses many career paths. The Current Population Survey (CPS) categorizes workers in music as ‘musicians, singers, and related workers.’ The Bureau of Labor Statistics’ Occupational Employment Statistics defines the occupation of ‘musicians and singers’ as one who “play[s] one or more musical instruments or sing[s]” and “may perform on stage, for on-air broadcasting, or for sound or video recording” (Bureau of Labor Statistics 2019). The related workers component of the CPS also includes both ‘music directors and composers,’ and ‘disc jockeys, except radio.’ This helps further identify what the composition of the occupation of musician looks like. According to the 2019 CPS Labor Force Statistics household data annual averages, 202,000 musicians are employed in total in the United States, of ages 16 years and older. Among that group, 63.3% are male and 78.9% are white, both above the average for the total population of workers. The remaining race distribution of musicians is 12.4% black, 3.9% Asian, and 9.7% Hispanic (Bureau of Labor Statistics 2020). From 2012-2016, 27.8% of musicians identified as a person of color. This is higher than the proportion of all artists – including musicians, but also visual artists, mainly fine artists like painters, sculptors, and illustrators – that are persons of color, as 24.6% of all 2.2 million artists in the United States identify as a person of color, according to the American Community Survey (NEA 2019). For the total population of workers in 2016 though, the share that is non-white or Hispanic is actually much higher, with 33.3% of workers identifying as persons of color (Flood et al. 2020).

The updated Labor Force Statistics from 2020 show the population of musicians in the U.S. as decreasing from 2019 by almost 10%. Also, in 2020, the share of women musicians went down from 36.7% to 31.5%, a decline of 14.2%, indicating women may have been hit harder by pandemic job loss than men within the music industry.

The "Artists and Other Cultural Workers" report from the National Endowment of the Arts (NEA) finds a very similar number to the CPS estimates; there were about 211,000 musicians on average from 2012-2016, of which 66.9% are male (NEA 2019). Comparatively, among all artists (including actors, photographers, fine artists, animators, writers/ authors, dancers/ choreographers, producers/ directors, designers, other entertainers, etc.), 53.6% were male, indicating some gender inequality within the music industry. However, the NEA finds that women musicians earn \$0.92 for every dollar a male musician makes, indicating there may be higher gender equality in terms of earnings within the music industry compared to other arts-related industries (\$0.77 to \$1 for all women artists). This rate drops as age increases, with more gender income disparity at older ages, indicating a trend towards increasing gender equality within the music industry in recent years (NEA 2019).

Women's-to-men's earnings ratio by age group: 2012-2016

Artists working full-year/full-time



Source: American Community Survey (ACS), PUMS, U.S. Census Bureau, from: "Artists and Other Cultural Workers" (2019)

Within specific genres, DiCola (2013) finds that there is a much larger gender disparity. Genres like rock (87%), jazz (87%), country (84%), and rap/hip-hop (97%) have much higher rates of male musicians than average. This compared similarly to the genre distributions of live music festival lineups occurring when this study was conducted in 2011 (DiCola 2013).

When observing the education levels of musicians, it is found that a significant portion of occupational musicians are not college-educated. Among musicians, 54.3% hold a bachelor's degree or higher, with the most common college major studied being Music, by 42.3% of degree holders (NEA 2019). DiCola (2013) similarly finds that 44.9% of musicians hold a college degree with 34.9% earning a graduate degree or higher. Musicians are actually more highly educated than the general population on average, surprising for a field in the arts, yet the majority of musicians still do not have a collegiate-level musical education. DiCola also finds a wide disparity across genres and types of musicians; about 79.2% of classical genre musicians (those who specialize in classical, jazz, or composition) have attended some sort of music school or conservatory and 88.3% of classical genre musicians earned a degree in music. Certain music genres like classical music genres may basically require a degree in order to secure salaried work to earn a living wage. In all other genres, only 46.2% attended a music school or conservatory and 45% earned a music degree (DiCola 2013).

Secondary Employment

Musicians commonly practice 'moonlighting,' or holding a secondary job in addition to a primary job. In 2017, 188,000 workers reported that musician was their primary job, but another 100,000 workers held secondary jobs as musicians. Of all types of artists, musicians have the highest rate of holding the occupation as a secondary job, with 34.8% of all musicians being employed secondarily (NEA 2019). That percentage was higher than from a report from the National Endowment for the Arts (2014) in 2013: that report finds that 29.4% of musicians worked in music as a secondary job. While these two percentages observed may not be statistically significantly different, this difference from 2013 to 2017 could indicate a trend that secondary employment is rising over time for musicians. If true, this finding could shed light on a systematic issue, where musicians are less likely to make living wages as primary musicians as time goes on, shifting more towards more popularity in secondary employment in music as we enter the era of streaming and the gig economy.

Unemployment

Employment in the arts and culture has risen each year from 2012 to 2016, after declining each year since 2001. Unemployment of artists in general peaked around 2009-2010, during the Great Recession, and has steadily declined since then, as artists' employment level gradually recovered (NEA 2019). When accounting for volatility, the unemployment rate of musicians may not capture the full picture since many self-proclaimed musicians are employed in other full or part-time jobs on the side, even if working as a musician for their primary occupation. Occupational musicians also could still technically be 'employed' as self-employed or non-salaried musicians, but still looking for work within the music industry, making them potentially still unemployed as musicians periodically.

When looking at the aftereffects of the pandemic, we could see another spike in the unemployment of musicians, not only due to a decrease in willingness for consumers to spend money on the arts but also because of the complete absence of concerts and live events, removing most employment opportunities for performing musicians.

Self-Employment

Self-employment is defined by the IRS as earning $400 or more of independent income annually (Schonberg 2017). Many musicians are inherently self-employed due to the nature of their job, as many musicians do not work within an organization for a wage or salary. From 2012-2016, 34.1% of artists identified as being self-employed, which is much higher than the proportion of all U.S. workers (9.4%). A high level of self-employment within the arts is expected since it includes those such as visual artists, who skew towards self-employment, in order to produce works and earn income on their own schedule. However, the self-employment of musicians is unexpectedly large, with 44.6% of musicians being self-employed (NEA 2019). In contrast, only 26.0% of dancers and choreographers were self-employed. Musicians are 4.7 times more likely to be self-employed than all other workers.

Jeffri (2008), in a study of composers, confirms this continual reliance upon self-employment in the music industry. The report cites the Bureau of Labor Statistics' 2004 data on occupational musicians which says that 41% of 'Musicians and Singers' were self-employed and 45% of 'Composers/ Music Directors' were self-employed. The NEA report (2005), similarly found that 44% of 'Musicians and Singers' were self-employed (Jeffri 2008).

While self-employment provides independence and flexibility, there are drawbacks for artists. Earnings are less in total and more variable when self-employed compared to artists on payrolls earning wages or salaries. From 2012-2016, self-employed artists that work full-time and full-year averaged $65,347 annually, around $4,000 less than artists earning a set wage or salary. Also, they report a higher standard deviation in income for self-employed artists ($81,700) than payrolled artists ($56,000), indicating greater unpredictability in income for self-employed artists (NEA 2019). Also, 17% of self-employed artists are uninsured, while only 10% of artists on payrolls lack health insurance. What remains unclear is whether these results hold when narrowing the sample down to just musicians, rather than all artists. Another factor to consider is whether self-employment has been increasing for musicians recently, with the explosion of the gig economy, which presents new opportunities like driving for Uber or lining up digital freelance work, to help support those who can't make a living wage solely from music-related income.

Income

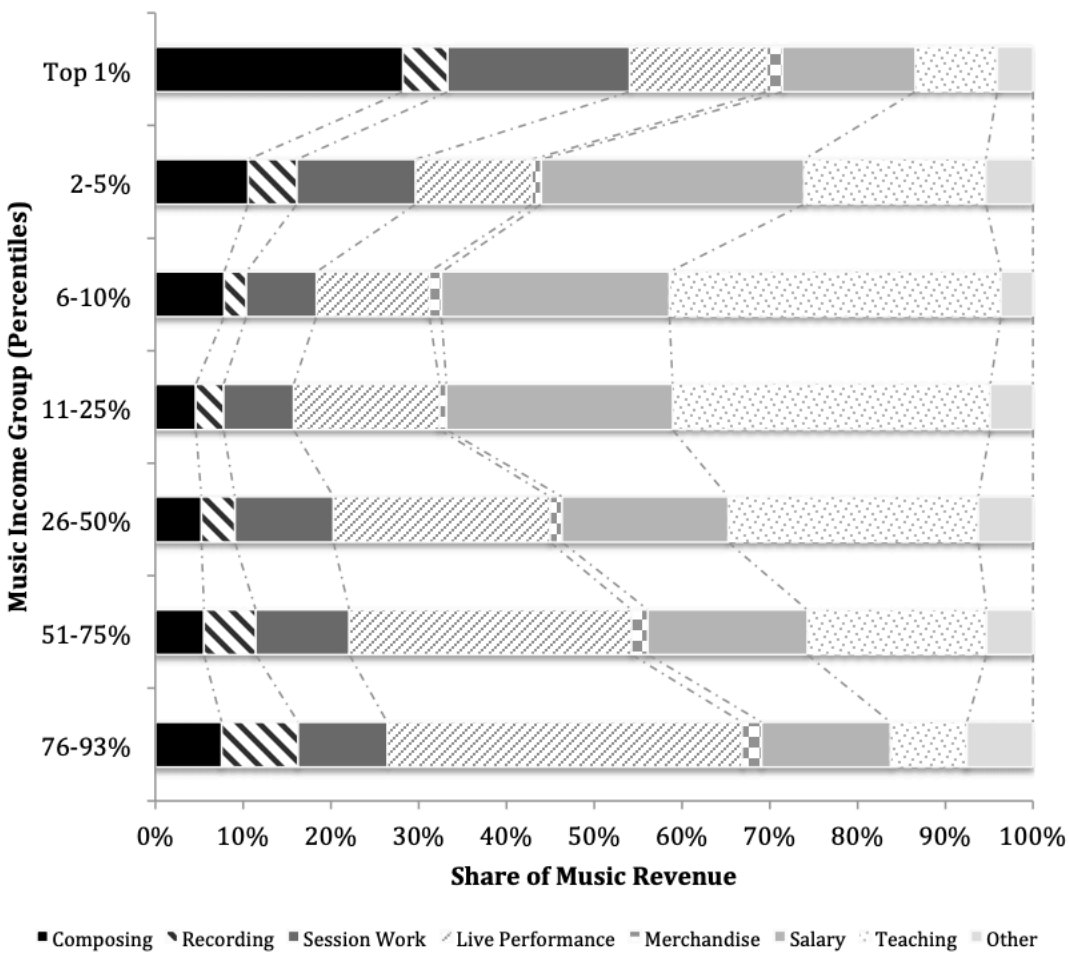
The NEA (2019) finds that the median annual earnings for full-time musicians from 2012-2016 are $42,240. This is significantly lower than the average median annual earnings for all artists ($52,800), and slightly below the average for all workers ($44,640). The median hourly wage for musicians as of May 2019 was $30.39 per hour (Bureau of Labor Statistics 2019).

DiCola (2013) takes a closer look at music-related income specifically. Understanding the time spent on music-related income-making is helpful when looking at the mean and median music-related income levels for musicians: 54.9% of musicians surveyed reported spending less than 30 hours per week working on music in any facet, whether that be performing, working on music or compositions, teaching, or developing their musical career in any way. This proportion being over half of all musicians shows that musicians aren't often able to work on music-related work activities full-time, as music-related income is often not sufficient to provide a full-time wage. The median music-related income for all musicians surveyed was $18,000, while the mean music-related income was $34,456. This immense positive skew within the distribution of music-related income indicates that top earners among musicians make most of their money from music, as opposed to smaller and less successful musicians, who often derive much of their income (potentially greater than 50%) from other occupations. The 25th percentile of distribution is only making $5,000 per year in music-related income, meaning a significant portion of working musicians may be earning below the poverty line.

Income Inequality & Industry Structures

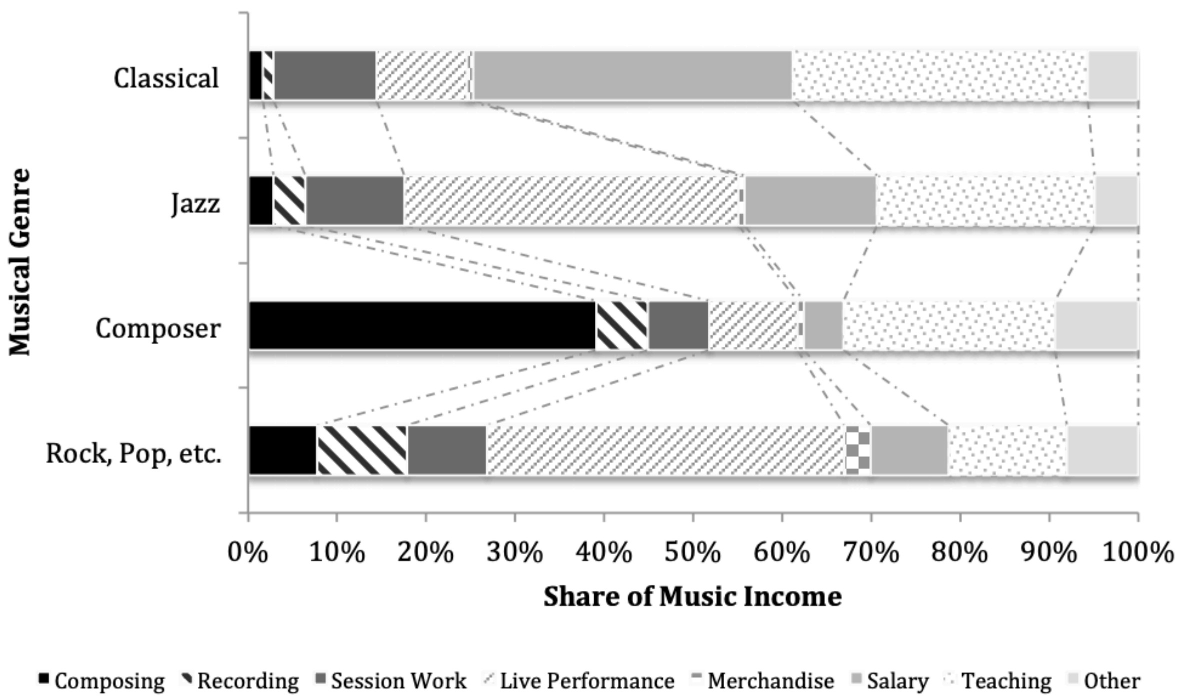
DiCola (2013) found the mean annual income of musicians surveyed was $50,000 and the mean annual income was $55,561. Income for these musicians skewed to the right, as some musicians at the top make much higher wages, as expected from the unbalanced nature of the music industry. This is common in the industry, where only the very top level of performers, usually public figures, have access to the most wealth. The survey also captures membership in various organizations like unions and performance rights organizations (PROs), and higher rates of involvement with PROs often correlates with musicians that are performing in larger, more formal venues and have recorded music publicly available, needing copyright protection and management to coordinate with music venues and digital music platforms. In this survey, 100% of jazz musicians, 100% of composers, and 95% of 'Rock, Pop, etc.' musicians within the 1st percentile income group have membership with a PRO. There is a significant drop-off within each genre as the income group decreases. Specifically looking at 'Rock, Pop, etc.' musicians, within the next income group, 2nd to 5th percentile, only 71% of these 'popular' genre musicians have PRO membership, as well as only 58% within the 6th to 10th percentile income group. Realistically, the top-earning popular music performers have enough occupational stability to have heavy involvement with unions and PROs since they make the majority of their income from record music sales or live performances within formal or established venues that have contractual relationships with these performance rights organizations.

Categorizing income groups of musicians and looking at the share of music-related income from various revenue streams sheds light on the imbalances in sources of earnings between top-earning musicians and lower-earning musicians. The report points out those in lower music-related income groups tend to earn a larger proportion of music-related revenue from live performances, meaning small musicians are disproportionately affected by the pandemic's shutdown of live events. Teaching revenue is highest at the upper end of the estimated music-income distribution, highest for musicians in the 6th to 10th percentile and 11th to 25th percentile income groups. Sound recordings also account for the highest portion of music-related income for the two lowest income groups, making up 6% and 9% of total music-related revenue, respectively.



Source: DiCola, Peter C. (2013) "Money from Music: Survey Evidence on Musicians' Revenue and Lessons About Copyright Incentives." p.59

Analyzing income stability of different types of musicians by cross-tabulating the share of music-related income and the genre of music also proves insightful. 'Popular' music genre artists (from genres like rock, pop, folk, indie, country, electronic, blues, etc.) receive 40% from live performance and 18% from the sale of sound recordings and compositions, showing some reliance on irregular sources of income like live performance and physical and digital music sales. These musicians are often non-salaried as well, with only about 8% of revenue coming from a regular salary or wage. Additionally, these musicians only receive 13% from teaching and 9% from session work. When factoring in merchandise, 'popular' musicians are relying upon only a small proportion of their income in 'stable' music-related earnings like salaried work, session work, and teaching. Classical music genres, including classical and jazz performers and composers, on the other hand, have income sources concentrated in more stable revenue streams like composing, teaching, and salaried revenue.



Source: DiCola, Peter C. (2013) "Money from Music: Survey Evidence on Musicians' Revenue and Lessons About Copyright Incentives." p.60

In 2017, 65% of U.S. adults used digital media to listen to popular music such as rock, country, or hip-hop, so the relationship between popularity of the genre and the opportunities present and income stability at large is very dissonant (NEA 2017). As of 2020, streaming has exponentially increased consumer participation in digital music, therefore digital engagement with these popular music genres now would most likely be much higher. Consumer engagement with digital music would seem to create many more opportunities for gaining income as musicians, but income is often more heavily concentrated in the live performances than sound recording revenue streams.

Analytics firm Alpha Data recently found that 90% of all music streams came from the top 1% of music artists in the first half of 2020, whereas the top 1% only accounted for the top 54% of all physical album sales over this same time frame (Blake 2020). Streaming is seemingly widening the gap between the top-earning musicians and the rest of the pack.

Revenue Streams

DiCola (2013) identifies 8 total revenue streams from which artists may earn music-related income:

1. Live performance, touring, show fees – (28%)
    - (ex: payments earned at gigs as a solo performer or member of an independent band or ensemble)
2. Teaching – (22%)
    - (ex: giving music lessons, working as a salaried teacher or professor of music, etc.)

This survey reports live performance as the largest source of revenue on average for musicians surveyed, accounting for an average of 28% of total music-related revenue. Teaching, the next highest, accounts for 22% of music-related revenue (DiCola 2013). Seeing teaching as the second-highest source of music-related income is relevant to the pandemic, where musicians shifted en masse towards giving virtual lessons in 2020.

3. Symphony, band, orchestra, ensemble salary – (19%)
    - (ex: wage earned as an employee of a performing orchestra or ensemble)
4. Session musician earnings – (10%)
    - (ex: recording studio work or assistance in live performance, freelance work)

The next highest revenue streams were earnings from salary from an organized performance group (19%) and session work (10%).

5. Songwriting and composing revenue – (6%)
    - (ex: royalties, licenses, sheet music sales, composing original works for broadcast, etc.)
6. Sound recording revenue – (6%)
    - (ex: sales of physical or digital music, royalty payments from streaming, etc.)

Revenue from compositions and sound recordings and royalties from compositions and sound recordings combine for 12% of the average musician's income. Looking back at the claim made recently by Spotify CEO Daniel Ek, it seems less likely that in order to make a living wage in music, all an artist needs to do is release music digitally more frequently. The future of the music industry is moving away from recorded music sales as a means to make a living, even back in 2011 when this survey was conducted. Live performance is the clear main source for earning music-related income but now, with COVID-19 at hand, musicians must turn towards other revenue streams.

7. Merchandise sales – (2%)
    - (ex: sales from t-shirts, posters, brand-related products, etc.)

Also, merchandise only accounts for 2% of music-related revenue. This revenue stream is perhaps the most variable among different genres of musicians. Many musicians surveyed are not solely performance artists with a public figure and ability to sell merchandise at tours and shows, and we see that this is closer to 3% among 'rock, pop, etc.' musicians, however, this portion of income could be much higher for small, performing and touring musicians who are more reliant upon merch sales. Of the 12.5% of respondents who actually earned some income from merchandise, an average of 14% of their actual music-related revenue comes from merchandise sales (DiCola 2013). This revenue stream is significant among certain performers, so by removing this source of income as a common byproduct of live performance sales, it becomes less clear how musicians will continue to earn a living wage in the near future, following the pandemic. Classical and jazz performers make almost no income from sound recordings or merchandise sales, so this reduces the larger impact that these two revenue streams could have on orchestra or chamber musicians.

8. Other – (7%)
   - (ex: grants, sponsorship, funding from fans, corporations, foundations, or other external sources of funding).

Lastly, demonstrated as necessary following the pandemic, the final revenue stream includes all other sources of revenue, including any sort of grants or external funding.

Jeffri (2008) looks at composers' revenue streams exclusively, representing the more stable side of the music industry. Even here, fractured revenue streams cause a level of uncertainty about future income. Professional composers earn most from commissions (32%), performance royalties (15%), live concerts (15%), and grants (15%). Non-professional composers also earn the most from commissions at 32%, but also earn significant income from live concerts (24%) and recording royalties (20%). This professionality is self-defined and reliant upon income, recognition, and time spent in occupation. Both professional and non-professional composers alike do not seem to be able to make a living wage on average by simply creating and performing compositions, however: 8.4% of professional composers said they earn their entire living from composing, as do only 0.6% of non-professional composers (Jeffri 2008). The importance of composing, in contrast to recorded music sales, makes sense for the classical and jazz genres compared to other genres. The reason why professional composers might earn a decent portion of their living from composing is through composing original works for film and television broadcast (Future of Music Coalition 2014).

The report also notes that 47% of professional composers work a primary or secondary teaching job, indicating either an adjunct role as a professor for a college or university or involvement as a teacher within a music school or independently. Only 21.8% of non-professional composers earn the majority of their living from teaching. Besides teaching, the next most popular occupation for earning a living wage for professional composers is another arts-related job (22.5%). For non-professionals, non-arts-related jobs are much more frequent, however, with 30.5% earning a living outside of the arts (Jeffri 2008). From this, it is apparent that more classically-trained professional musicians turn towards teaching or other jobs within the music industry for supplemental salary and are often more financially stable as a result.

When analyzing the change in revenue streams over time, DiCola (2013) simulated panel data by asking musicians how they have perceived their revenue streams have changed over the past 5 years. These responses were recorded in 2011, so the five years span the entirety of the Great Recession, which is somewhat related to today's current recession. Teaching revenue was reported to have heavily increased for musicians on average, while live performance fees, salaries, session work, sound recordings sales, and merchandise sales revenue all decreased over this time period. Teaching music seems to be the most resilient role a musician can assume after certain revenue streams are majorly cut off due to the financial struggles of music consumers. The current recession is a much different situation with performance revenue streams being cut to almost 0% without the means for live performance during the pandemic, and musicians have reported lost income and major loss of job opportunities over the months following the pandemic.

Revenue Streams & the Pandemic

Chamber Music America (CMA), a national service organization for professional chamber musicians and related workers, conducted two surveys in April and June of 2020 to examine the impact of COVID-19 on ensemble and chamber musicians, both qualitatively and financially. Chamber music encompasses jazz, classical, and world genres, usually performed in small group ensembles without a conductor.

By surveying and interviewing artists in the months following the pandemic, CMA (2020) concludes there has been a significant loss of income among chamber musicians from April to June, in the months between the two surveys conducted. This comes as a result of a substantial decrease in live performances and an increase in event cancellations. The well-being and personal outlook of the organization's musicians are also collected, with insights into musicians' use of remote technology and expected return to live performance. Among individual musicians, only 4.9% of chamber musicians reported no lost income over these two months. 69.1% of chamber musicians reported having a net income loss of over $5,000 over the two months between being surveyed, including 37.4% of chamber musicians who reported a loss of over $10,000 in income. Even if it only lasted for these two months, this is a significant loss, as the 2019 mean annual pay for musicians was $54,916 (Flood et al. 2020). We can assume those who have lost more income are generally wealthier, thus able to sustain such a loss in the short term. However, many non-salaried, gig musicians rely upon large single performances or events that may only occur a few times per year but account for a large portion of annual income. For those who are salaried and employed by ensembles or organizations, 24% of organizations surveyed reported laying off or furloughing employees. In both scenarios, we see salaried and non-salaried musicians having completely closed off revenue streams with no live performances and high rates of being laid off, in addition to fewer additional opportunities for income because of low economic activity.

However, the adaptability of these chamber musicians seems to be high when predicting how future income will be earned in the months following the initial economic downturn of the pandemic. As of June 5, 2020, 75.6% of individual chamber musicians had used remote technology in some way to host events. These remote activities were reported to include private teaching, virtual live performances, workshops or webinars, streaming past performances, religious services, fundraising events, and even non-paid events like rehearsals (CMA 2020).

The volatility of the occupation of the professional musician is evident from this recent survey after observing the severe impacts of the pandemic on income and employment opportunities for chamber musicians. Even in the most secure sector of the music industry, where workers are often salaried, these workers aren't completely protected. Oftentimes, chamber or classical performers must pursue graduate degrees or doctorates to remain competitive. Wagner (2019) mentions the drawback of college debt and the burden of buying one's own musical equipment. A 27-year-old performing violinist interviewed reported to have incurred over $100,000 in student loan debt from earning multiple degrees from Oberlin Conservatory and the Manhattan School of Music. Additionally, the instruments themselves used in professional performance are exorbitantly expensive, Wagner cites a viola to have cost her previous orchestra teacher $20,000, not including the cost of inflation as it was purchased decades earlier, and her own violin to have been $7,000. Oftentimes, less financially stable performers must rent their musical equipment if they cannot afford to incur these costs. This leads to further financial strain and less stability within this field.

Summary

Musicians face many problems within a changing and lopsided music industry. Almost half of all musicians are reported to be self-employed. Being in charge of one's own work schedule or earnings can prove stressful for finding employment opportunities, often spanning a wide range of venues or sources of income. Managing income independently across the many different revenue streams available to musicians could also be inefficient. Over a third of all musicians are working the job secondarily, indicating a level of instability that causes aspiring musicians to work primary full-time or part-time jobs in other industries in order to financially support themselves. Musicians are often working fewer hours, as a concentration of musicians in part-time work is evident. Women and music artists of color face challenges within the industry, as well as artists from popular, non-classical genres. More importantly, small, lower-earning musicians are disproportionately affected by the volatile industry structure and the ongoing pandemic without live performance opportunities.

The previous literature establishes that the music industry is huge with many opportunities seemingly available to prospective musicians, since the demand for music consumption is very high among the American population, for both in-person musical performances and digital music. The music industry spans very broadly, hosting musicians from many different genres, from rock to jazz, and from many different educational and experiential backgrounds, from doctorate degree holders to high-school dropouts. Musicians are inclined to be self-employed and to have secondary employment, which puts them in a difficult situation for finding income-earning and employment opportunities. Musicians often earn less than comparable gig occupations in the arts and on average earn less than the average American worker. Income inequality is also prevalent within the industry, with those at the top being the most secure and those at the bottom relying upon irregular revenue streams. The current pandemic further jeopardizes these at-risk musicians. Teaching music seems to be the next best source of income following the cancellation of all live performances, as observed to be the most resilient role a musician can assume during times of financial distress.

What is left to discover is how musicians are uniquely disadvantaged in other measures of economic instability and how specifically musicians have struggled following the pandemic.

My research questions going forward are as follows:

1. Is working in the arts, specifically the music industry, less stable and discouraging for workers in terms of employment and income (oftentimes requiring secondary employment or gig work), and is making a living wage in music viable?

2. What impact has the pandemic had on the music industry in terms of income and employment and how does it relate it to the existing instability?

3. What is the next step forward and how can musicians best mitigate this volatility and hedge against uncertainty in the industry?

METHODOLOGY & DATA

In my analysis, I use IPUMS-CPS monthly data as well as the yearly Annual Social and Economic Supplement (ASEC) for a longer look at patterns in employment and income for professional musicians. I look specifically at trends related to primary and secondary employment of musicians, comparing these employment trends to other similar occupations, within the arts and in other industries, such as construction work, in order to frame the reliability of employment in industries where workers are often non-salaried and gig work is prevalent. Self-employment and part-time employment of musicians and artists are observed as well in order to further capture the stability and volatility of these occupations. Other measures of economic stability are also included to broaden the scope of what makes the profession unstable outside of just employment and income. From the ASEC, I look specifically at variables like the number of weeks worked part-time and the number of employers worked for in the past year to get a closer look at how specifically musicians' employment outcomes may be unfavorable.

To encapsulate the current state of the ever-changing music industry before the pandemic, I narrow my analysis to the years 2014 to 2019, comparing musicians to similar workers. I also use current day 2020 monthly data in order to track the impacts of the pandemic month-by-month on the affected workers, further drawing a comparison between pre-pandemic and post-pandemic conditions of musicians and related workers. Specifically, I focus on the CPS trends in the months from April 2020 through December 2020 in order to observe the short-term impacts of COVID-19 and the repercussions of the pandemic on employment and income of professional musicians, using the COVID-related questions that the CPS has recently added. Also, by running basic statistical analysis using CPS data and specific occupational codes to compare musicians to other similar gig occupations like other artists or construction laborers, who may have similar employment trends like higher levels of secondary employment and self-employment, I am able to give more insight as to whether this volatility is unique to the music industry.

The sample of musicians for the 2014-2019 CPS analysis totals 6,260 'musicians, singers, and related workers,' averaging around 1,043 musicians sampled each year. For the 2020 analysis, the sample consisted of 595, averaging around 50 musicians sampled per month. The definition of a musician, according to the CPS, includes those that work as a musician as their primary occupation, as well as those who may be temporarily unemployed or not currently in the labor force but worked as a musician as their most recent occupation. Part-time musicians were not included in this dataset if they had another primary occupation at which they worked more hours, since respondents with multiple jobs only reported the occupation with the largest number of hours worked.

EMPIRICAL ANALYSIS

To begin my empirical analysis, I give a definition of what volatility means in the context of the employment and income of an occupation. I then provide a comparative analysis of these defining characteristics with musicians and other similar gig occupations, like artists and construction workers. Further, I look at how this volatility aligns with the current state of the music industry and how the pandemic further fuels this instability within the occupation.

Before the Pandemic

In order to further determine the portrait of how musicians were faring economically in the years before the pandemic hit, I analyze 2014-2019 CPS data, narrowing in on only the current state of the music industry to draw a fair comparison to how things are going post-COVID-19.

Most of the pre-pandemic income volatility for musicians has already been covered in the previous literature review analysis, but this section builds on previous studies by showing the employment volatility observed in the music industry. Measures like weeks spent working part-time, number of employers, plus a generated variable to define what a disadvantaged worker looks like by categorizing them by worker status are helpful in separating musicians' unique circumstances from that of other gig occupations. Another way to measure the economic stability of musicians is determining whether they are more likely to live in multiple-family households or less likely to have health insurance coverage, compared to similar non-salaried jobs, both of which can indicate greater financial volatility within the occupation.

Employment Volatility

Using the Annual Social and Economic Supplement (ASEC), I was further able to identify employment trends of musicians that may explain why the industry is more unstable, including weeks spent working part-time within the past year and the number of employers in the last year. Musicians are often self-employed or contracted out by several different employers in order to earn income from more sources and due to the nature of the occupation as gig work. From 2014-2019, 19.4% of musicians worked for more than one employer during the past year. In contrast, only 10.9% of artists and 11.1% of construction laborers worked for multiple employers over the same time period. Almost twice as many musicians, compared to artists, had spent time working for multiple employers within the past year, emphasizing the specific instability that the music industry has, in that musicians must bounce around from employer to employer. This has further repercussions with an increased difficulty of obtaining health insurance coverage and benefits.

Another ASEC variable that supports the instability of musicians' work schedules is weeks worked part-time in the last year. Part-time work among musicians is very common with 55.1% of musicians working as part-time workers from 2014-2019. Comparatively, 37.2% of artists were part-time and 14.7% of construction laborers were part-time workers from 2014-2019. Excluding those who worked part-time for all 52 weeks of the year, from 2014 to 2019, musicians as a whole averaged 11.9 weeks per year spent working part-time. Artists averaged 7.4 weeks spent working part-time per year and construction laborers averaged 3.9 weeks worked part-time per year, among those not fully part-time. This adaptation, which musicians must more frequently make, reveals a lot about the nature of the occupation, in which musicians must be more flexible with their work schedule. They often must switch between full and part-time work in response to scattered employment opportunities.

Revisiting patterns of self-employment from previous studies, I find that, according to CPS data from 2017 to 2019, an average of 49.4% of musicians are self-employed. The NEA (2019) found that 44.6% of musicians were self-employed from 2012 to 2016. This recent uptick in the popularity of self-employment among musicians can most likely be attributed to the exponential rise of the internet and the gig economy in recent years. These recent developments have allowed musicians to enter the industry more easily, work for themselves, and set up their own employment opportunities, rather than work for an employer. However, this often comes at the expense of working part-time and finding a second job to financially support oneself.

Additionally, I have tried to define what a disadvantaged worker would look like using the worker status variable from the CPS. I consider any worker to be *disadvantaged* if they are: (1) full-time but usually part-time for economic reasons, (2) part-time for economic reasons but usually full-time, (3) part-time for economic reasons and usually part-time, or (4) not at work and usually either full-time or part-time. These *disadvantaged* workers are out of place within the labor force, having experienced some recent disruption in their work habits that have caused them to shift employment status, hours, or become temporarily out of work. I chose not to include unemployed workers seeking employment in this statistic as I wanted to maintain the definition of *disadvantaged* workers as those who are active in the workforce but unable to find regular employment opportunities or opportunities that fit their desires.

From 2014-2019, 13.0% of working musicians were *disadvantaged*, compared to 11.9% of working artists and 11.8% of working construction workers. In this case, musicians seem to be slightly more susceptible to disadvantaged working conditions than other similar gig occupations. Previous studies indicated that musicians are more likely to work part-time and experience higher levels of unemployment, but this reveals that even working musicians are displaced within the industry, often forced to take jobs or works hours that do not meet their needs or preferences.

As an alternative definition of a *disadvantaged* worker, I also include those who work multiple jobs, another indication of a stressor to a worker. These workers necessitate another job to financially support themselves, which also highlights the instability of the industry. For example, many musicians must take second jobs in order to financially support themselves. By this definition, 25.3% of musicians from 2014-2019 are *disadvantaged*, while 19.3% of artists and 13.9% of construction laborers are considered *disadvantaged*. This means that around a quarter of working musicians have shifted their working habits for economic reasons or are temporarily out of work.

Also, 16.9% of musicians in the labor force wanted a job and were looking for work from 2014-2019, while only 10% of artists and 6.08% of construction laborers actively wanted a job. The profession of musician comes with a constant struggle to find a path forward. The fact that more than 1 in 6 musicians report that they actively want work only shows part of the struggle of the occupation, with many of the rest already having taken on second jobs, working for multiple employers over short periods of time in order to meet their employment needs, or experiencing other disadvantages within the workforce.

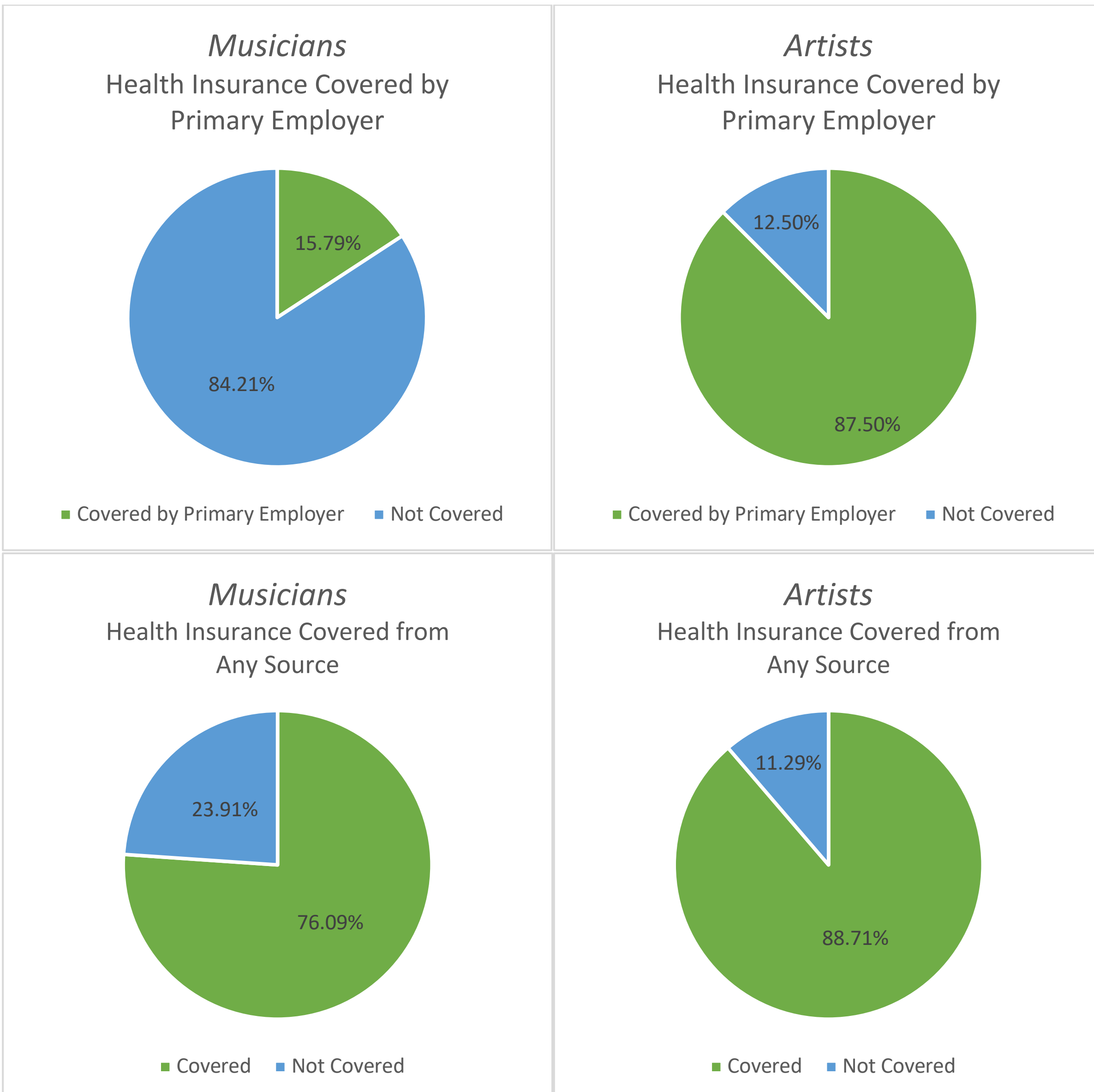
Other Measures of Economic Instability

One additional way to determine the stability of workers is to observe their health insurance coverage. Comparing musicians and artists, musicians seem to find it much harder to secure health insurance through a primary employer, meaning this coverage must come out of their own pocket. From the May 2017 Contingent Work Supplement, only 15.8% of musicians, singers, and related workers were able to get health insurance through their employer, while 87.5% of artists and related workers were able. Though the sample size for both occupations is quite small, this difference in proportions between the two occupations is extremely statistically significant with a p-value of 0.000049. This sample isn't even including self-employed workers, who must provide health insurance for themselves as well; the data list them as "not in universe" because they do not have an employer. This means that musicians are often employed by companies or organizations which are not willing to invest in their well-being and future development.

As discussed previously, many musicians are gig workers, which does have its benefits for constructing one's own work schedule and maintaining flexibility; that flexibility is cited as the most popular reason for self-employment among musicians according to the 2017 Contingent Worker Supplement. However, employers or buyers contract musicians for temporary events, performances, or instructions, meaning they are not responsible for providing health insurance.

Even then, artists are also commonly gig workers as well, yet are still much more likely to receive coverage from their employers, showing a unique issue present within the music industry.

Figure 1



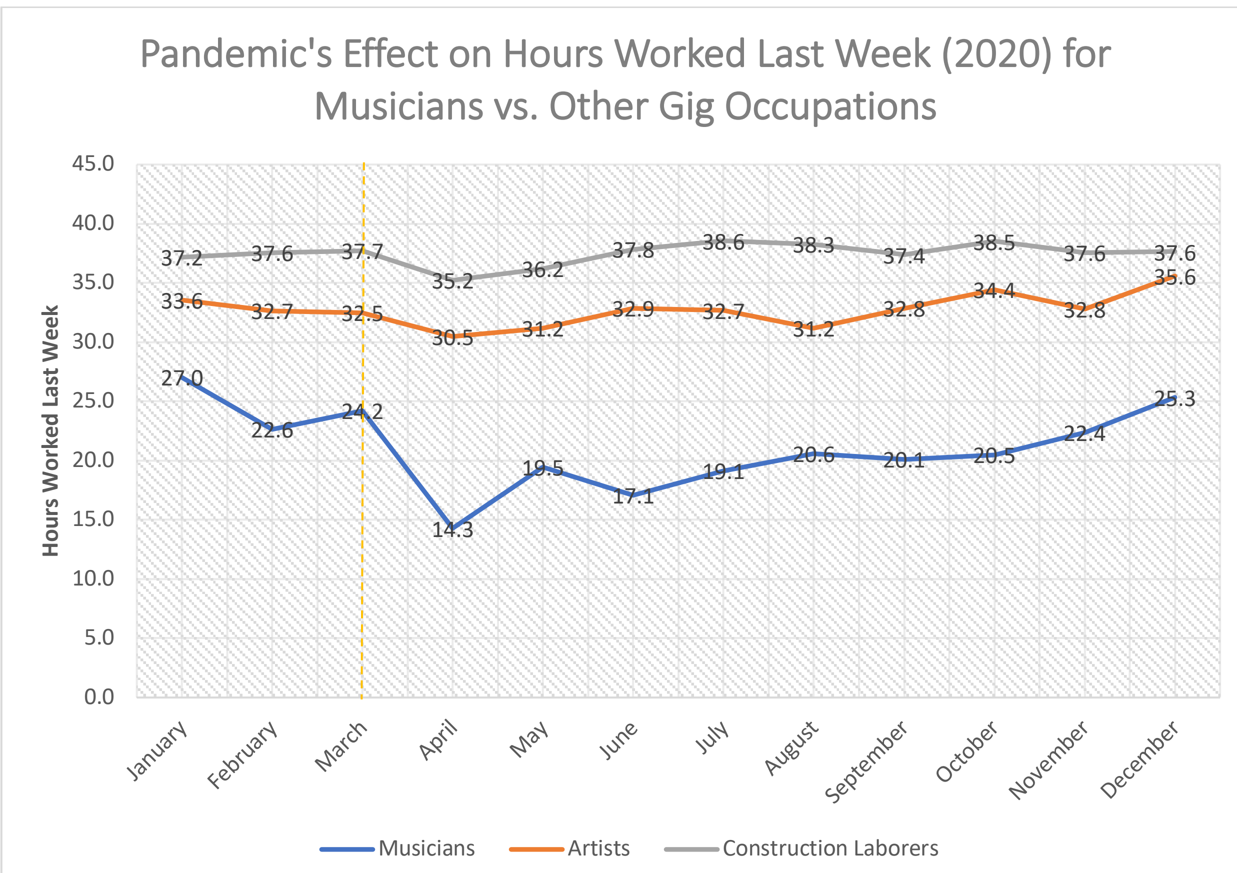
Viewing total health insurance coverage from any source, 23.9% of musicians are uninsured, while 11.3% of artists are uninsured, on average. Musicians are insured at a significantly lower rate than artists at the 95% confidence level, with a p-value of 0.0409. Musicians have a low level of health insurance coverage compared to artists and the working population as a whole, as 8.8% of people were uninsured in 2017 (US Census Bureau). Additional volatility in areas besides income and employment opportunities, like health insurance coverage, puts musicians at much greater risk for economic instability. When a global pandemic is introduced to the workforce, an occupation like musician with lower levels of coverage would logically experience disproportionate destruction to their economic stability, if in need of medical attention. Not only does having a higher rate of being uninsured, compared to other workers, display the unreliability of the occupation, but when health care is very much needed in the times of a global pandemic, many musicians are left vulnerable to the health and financial implications of the virus.

Musicians are also significantly more likely to live in multi-family households, indicating a lack of financial freedom in order to obtain their own single-family household. About 9.8% of musicians live in 2+ family households, while 8.3% of artists live in multi-family households, a difference that is statistically significant at the p=0.0007 level. Also, 8.47% of construction workers live in 2+ family households. Similarly, there is statistical significance at the p=0.00035 level that the proportion of musicians living in 3+ family households (3.40%), is higher than the proportion of artists living in 3+ family households (2.45%). Furthermore, 2.57% of construction workers live in 3+ family households. Financial independence, it seems, is much harder to come by as a musician; being able to afford one's own household is less common and musicians rely more upon splitting costs with other families.

How the Pandemic Makes Things Worse

Now, that the current stressors to musicians have been outlined, the pandemic has further complicated things by completely removing the largest revenue stream for musicians (live performance) and by causing many other harmful effects to the economic well-being of musicians. Looking at post-COVID 2020 CPS data conveys a shift in employment and income-earning opportunities for musicians. Figure 2 (below) creates a jarring visual of the unique impact of the pandemic on the weekly hours worked by musicians.

Figure 2



Musicians saw a 41% decline in hours worked from March to April 2020 which is very concerning and shows that in these extreme circumstances, musicians' access to employment opportunities were cut by almost half. Other similar gig occupations like artists and construction laborers, did not see nearly as big of a drop-off in weekly hours worked following the initial shutdowns and economic downturn caused by the pandemic in March 2020. The hourly employment for artists and construction workers saw only a 6.2% and 6.7% decline, respectively.

For an idea of what the normal hours worked per week for each occupation is usually, the average number of hours work within the last week from 2014 to 2019, according to an analysis using the ASEC, was 27.5 hours for musicians, similar to where *Figure 2* starts in January 2020. It took until December for musicians' hours to recover, sitting at 25.3 hours worked per week, though this number still falls somewhat short of their pre-pandemic average. The average hours worked per week for artists over this 5-year period was 34.8 hours per week, close to both the start and end of 2020, showing on average a full recovery to normal hours for artists. Similarly, construction laborers averaged 39.0 hours worked per week from 2014 to 2019, hovering slightly below this for all of 2020, showing little deviation in general from normal hours worked despite the pandemic.

Using post-COVID CPS data, from April to December 2020, I also explore how the employment status of musicians changed over time during the pandemic. Over the course of the pandemic, only 52.3% of musicians were at work, whether as usual in-person or remotely. In comparison, 75.9% of artists and 80.5% of construction laborers were able to be at work over these 9 months. Those not at work either: (1) have a job but were 'temporarily absent' and not at work within the last week; (2) are unemployed but an experienced worker; or (3) currently unable to work. The fact that almost half of all musicians over this time frame experienced one of these three difficulties shows how poorly the music industry adjusted to the occupational changes caused by the pandemic.

Looking at a month-to-month analysis of this percentage of each occupation able to be at work, a clear trend appears showing how difficult it was for musicians to deal with finding employment opportunities early in the pandemic. Work actually even seemed to be harder to come by for musicians several months into the pandemic, reaching a low of 37.0% of musicians at work as usual in the month of July, when incidentally COVID cases were spiking. It is incredibly alarming to think that almost two-thirds of musicians were out of work three months into the COVID-19 pandemic, still unable to find opportunities to perform live events or provide any sort of instructional work for pay in person. Over the summer, the percentage of musicians able to get back to work drastically improved; however, it dipped significantly in November and December. The explanation for this is most likely that the winter months made outdoor performances much more difficult. A typical musician who would be affected in this way during the pandemic is a local performer who plays gigs at bars and restaurants that may have been more able to facilitate a live performer in the warmer, summer months with outdoor dining. Venues are less able to hire these musicians in colder, winter months.

Another way of seeing who was not at work, besides the employment status variable, is by viewing the share of workers who were absent from work. *Figure* 4, as seen below, shows those absent from work in the last week, a reversal of the percentage of workers at work as usual chart in *Figure 3*, also seen below.

Figure 3

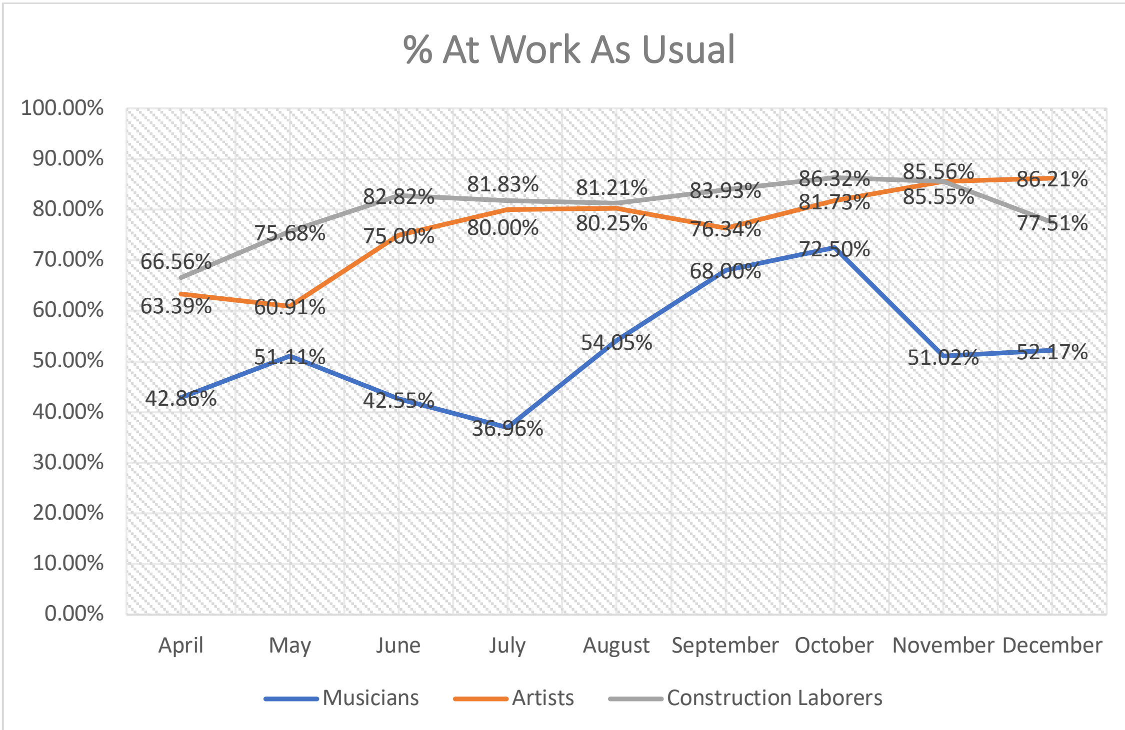
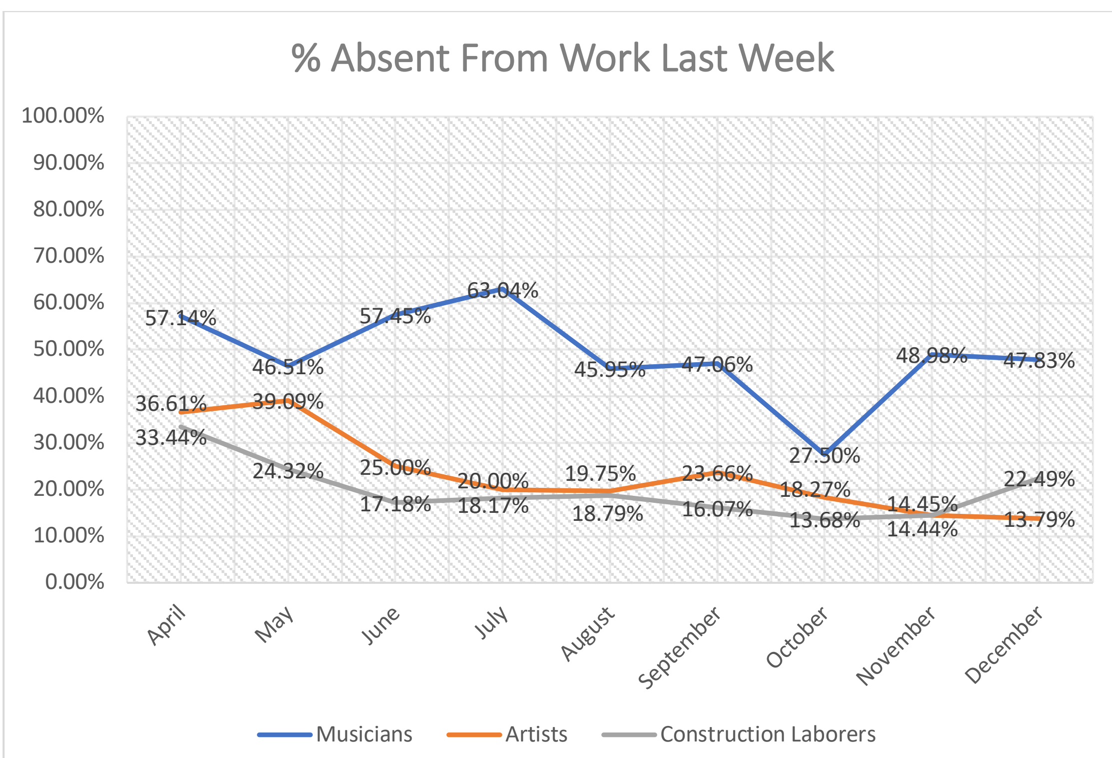
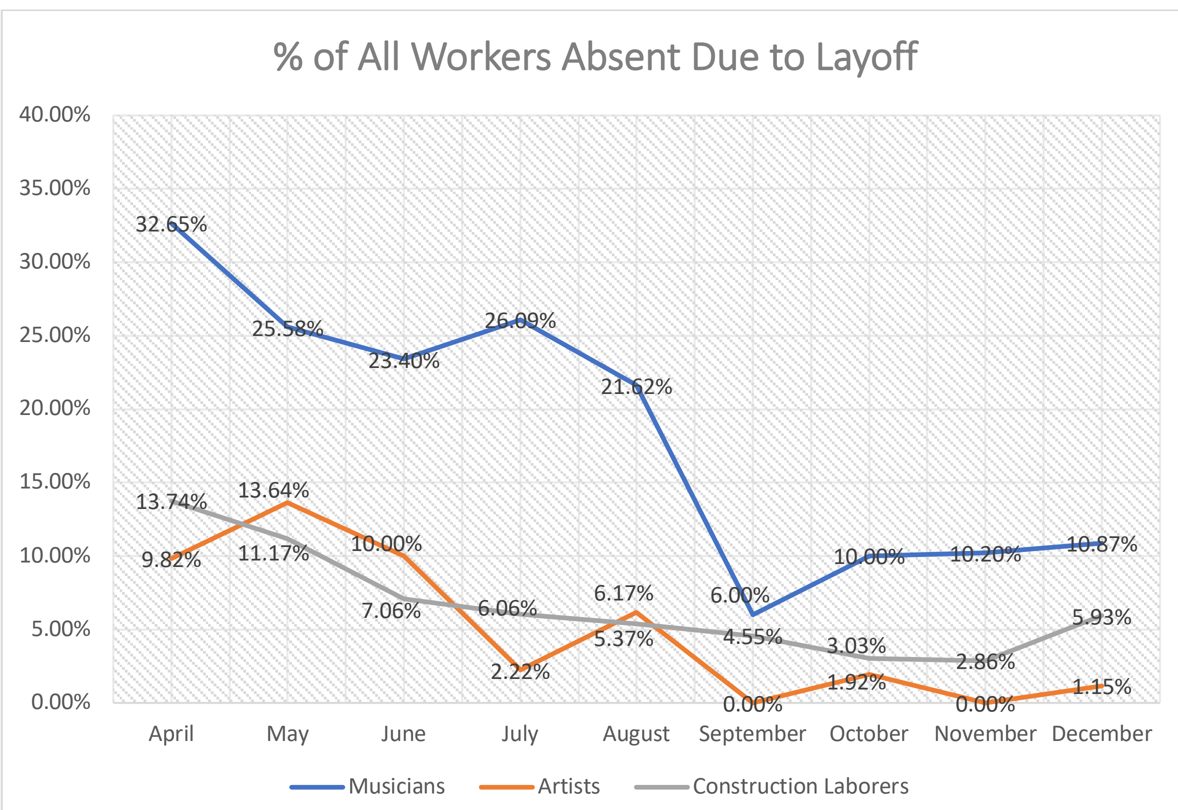


Figure 4



The CPS also asks why workers were absent from work in the last week, and whether they were laid off, unemployed, or absent for other reasons, such as vacation, illness, or a labor dispute. By limiting to those who were absent from work due to a layoff, we can further understand how the employment opportunities for musicians were impacted as a result of the pandemic. The most common reason for musicians to be absent from work was because of a layoff. In April, the first month after the pandemic began to economically affect the United States after country-wide lockdowns were implemented, 32.7% of all musicians were absent from work due to a layoff. This is startling in comparison to other gig jobs like artists and construction laborers who went into April with only 9.8% and 13.7% of workers laid off, respectively. Also, only 5.2% of all surveyed American workers in April were absent from work in the past week due to being laid off.

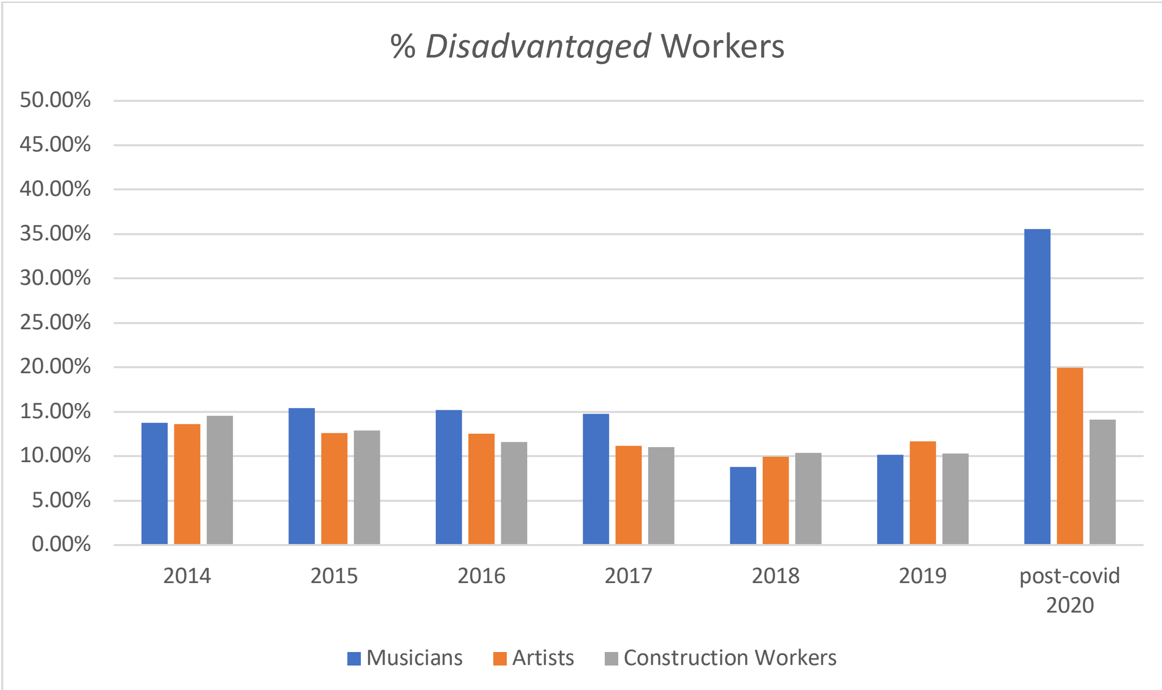
Figure 5



Even by July, over 26% of all musicians were still absent from work due to being laid off. Other occupations saw a much more drastic decrease in layoffs by the summer, with only 2.2% of artists and 6.1% of construction laborers out of work because of a layoff. By the end of the year, layoffs for musicians began to level out at around 10% of all musicians, while artists and construction laborers were down to 1.2% and 5.9% of workers out because of a layoff by December. This shows the vulnerability of the music industry, which from these numbers does not seem to have a safety net in place for its workers. The workforce, in general, was much more resilient with only 0.9% of workers absent from work in the past week due to a layoff in the month of December. This resilience is also seen with artists and construction laborers. These three graphs also closely resemble the confirmed COVID-19 cases chart in the United States, with economic impacts highest during the summer and winter, when cases peaked in July and December.

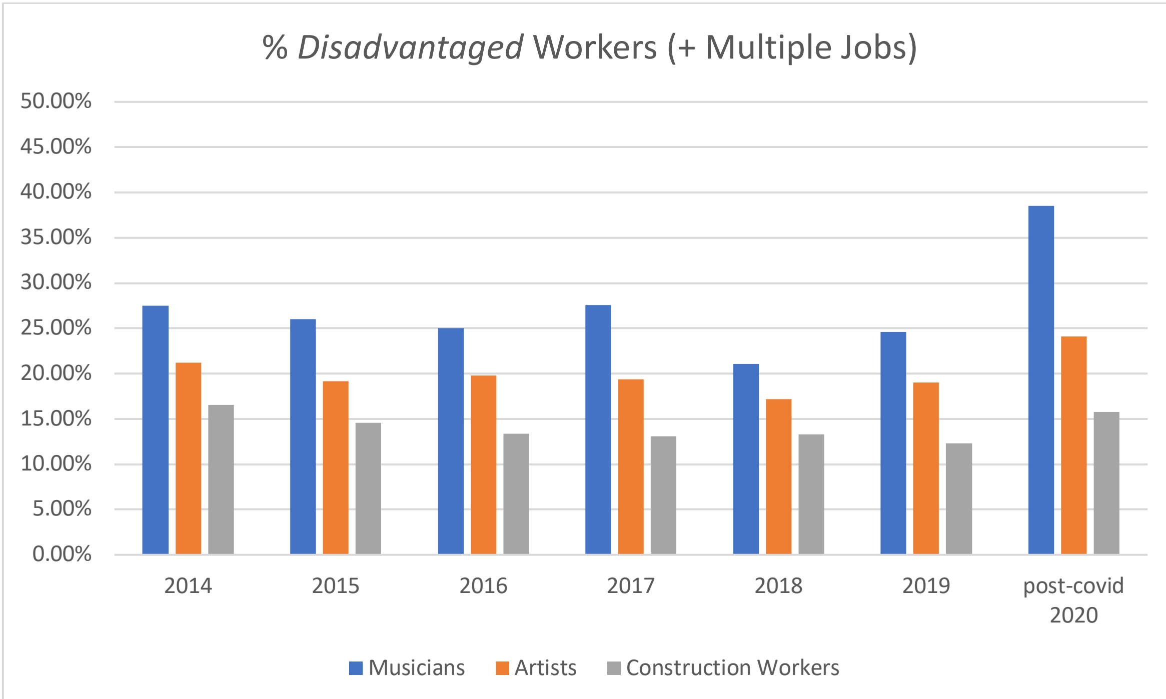
Revisiting the *disadvantaged* workers as defined in the previous section, musicians experienced a much higher increase in *disadvantaged* worker status than artists and construction laborers. Among working musicians, 35.6% were *disadvantaged* in some way from April to December 2020, more than tripling the rate from 2019, where 10.1% of workers were *disadvantaged*. Comparatively, 19.9% of working artists and 14.1% of working construction laborers were *disadvantaged* in 2020 following the start of the pandemic, large increases from 2019 (71% and 38%, respectively), but far smaller than the increase seen for musicians.

Figure 6



If workers with multiple jobs are included in the *disadvantaged* workers variable that was created, 38.5% of musicians post-COVID are *disadvantaged*. Meanwhile, 24.1% of artists and 15.7% of construction laborers are considered *disadvantaged* by this definition. Clearly, musicians are far more disadvantaged each year from 2014 to 2019 compared to similar occupations like artists and construction laborers, a situation made even worse during the pandemic. However, adding workers with multiple jobs to the *disadvantaged* workers in 2020 didn't make as much of an impact compared to the previous years, since workers were in jeopardy of losing hours or even primary employment, making secondary employment even more rare.

Figure 7

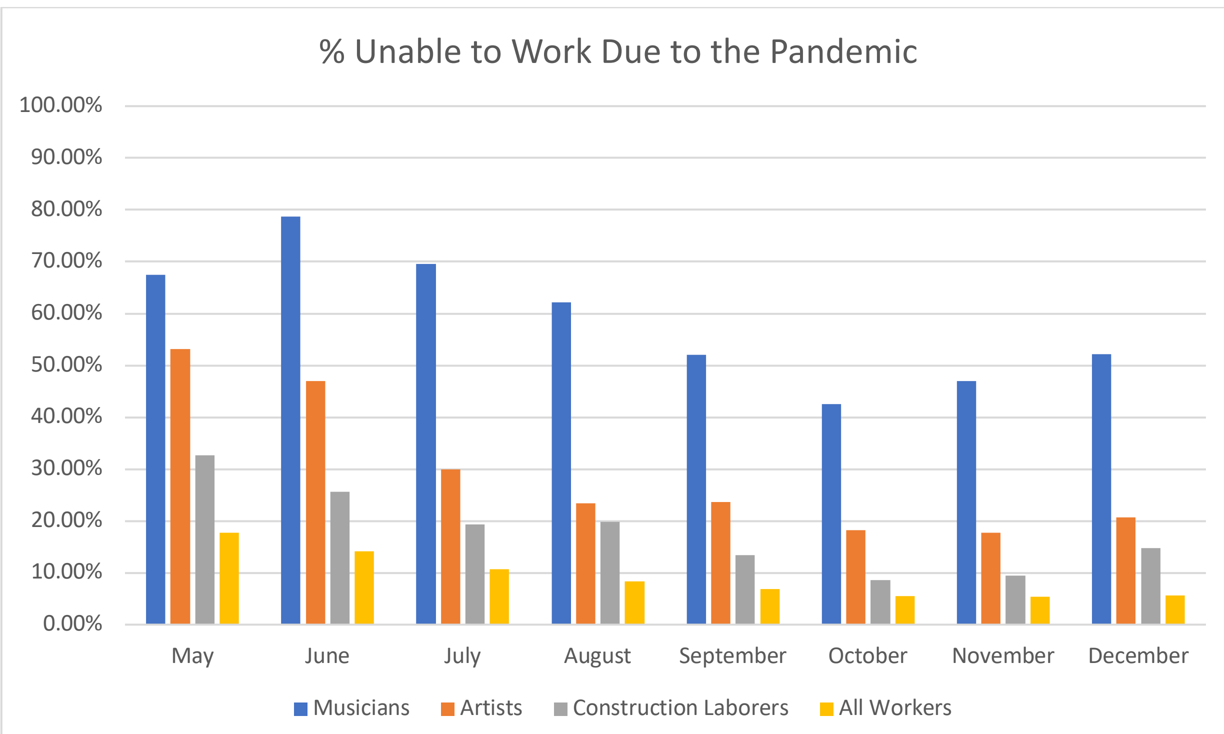


The COVID-19 Questionnaire

The CPS also added five new questions to their monthly survey related to the COVID-19 pandemic and its impact starting in May 2020. One question asks whether workers were unable to work due to the pandemic. Musicians were drastically impacted: the majority answered that they could not find any opportunities to work in the months following the start of the pandemic (using data from May to December 2020). Overall, 58.9% of musicians answered that they were unable to find work due to the pandemic during this time period, peaking at 78.7% in June. The fact that musicians were overwhelmingly hurt by the effects of the pandemic shines a light on the instability of the occupation; the music industry revolves around gig work and temporary, unsalaried jobs which are not sustainable in cases of economic downturn. Even months after the initial shutdowns in March, concerts and live performances, as well as most forms of musical instruction, were impossible to proceed with for working musicians who rely almost entirely on those sources of income.

Comparatively, 30.0% of artists and related workers were unable to work due to the pandemic, over this same time span, which still greatly outnumbers the 9.0% of all workers that weren't able to work. Additionally, 17.1% of construction laborers could not find work; this value is lower in comparison to the other two gig occupations because the work mostly takes place outdoors, and thus is not as economically impacted by the pandemic.

Figure 8

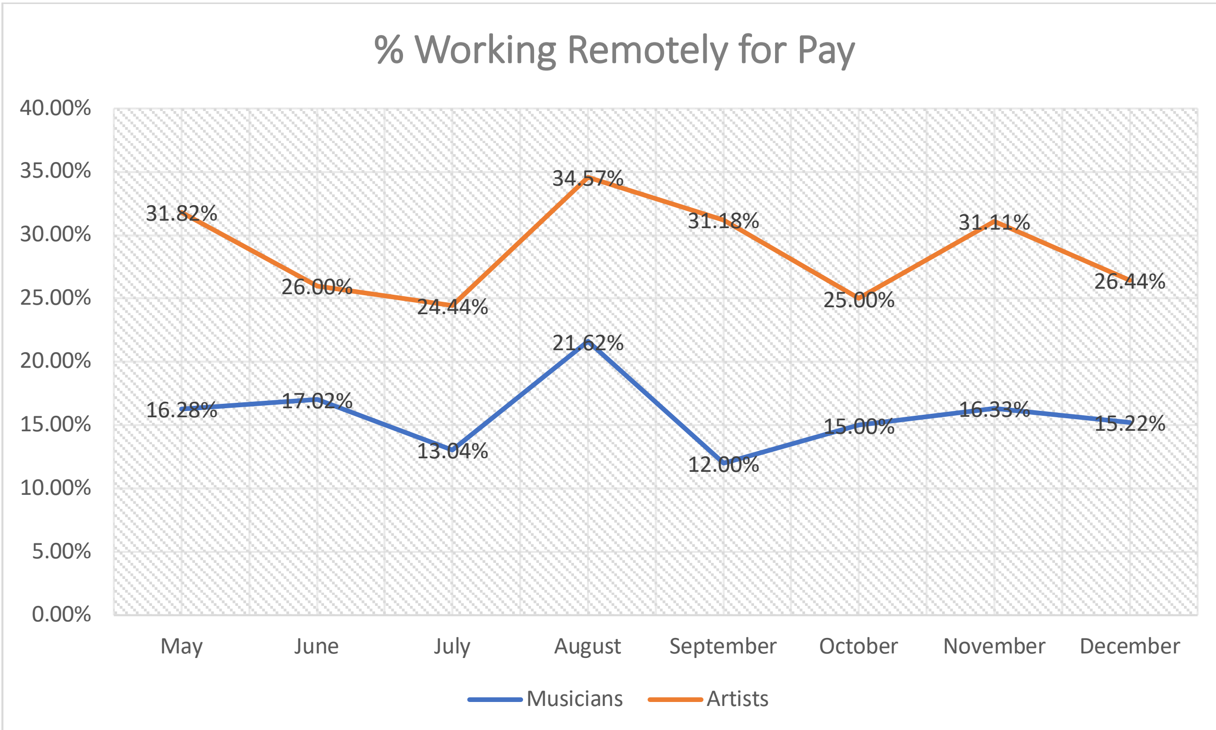


Through the 3 months of data collected directly following the pandemic (May, June, and July), 72.1% of musicians surveyed reported being unable to work due to the global pandemic. The issue here is that even short-term unemployment, where musicians are often earning zero income is prevalent, is severely damaging for musicians living paycheck-to-paycheck. For artists, this time frame yielded 44.2% of artists unable to work and for construction laborers, 25.8% were unable to work.

This survey also shows the volatility of the musician's profession in that many were not able to receive compensatory pay from hours not worked following the pandemic, since many don't have employers or a consistent salary on which to rely, as self-employed musicians. Only 5.7% of musicians who were unable to work due to the pandemic earned compensatory pay for time spent not able to work, which could be due to events or performances being canceled without any compensation. Most likely, this small portion of musicians who were able to receive some compensation were part of a musical group or an organization, although many who had salaried jobs also could not receive compensatory pay. Institutional funding for musicians has been scarce and hard to come by following the pandemic, as seen by Chamber Music America, which further confirms this low level of compensation for musicians (CMA 2020). Meanwhile, 10.2% of artists and 7.2% of construction laborers who were unable to work due to the pandemic earned pay for that time spent not able to work. Also, 14.6% of all workers unable to work because of the pandemic were able to receive compensatory pay for hours not worked.

Additionally, of musicians previously employed and participating in the labor force, 23.3% were able to work remotely for pay in the months following the pandemic. In comparison, 32.6% of artists were able to work remotely for pay due to the COVID-19 pandemic. Including unemployed musicians, many of which could have been unemployed as a result of the pandemic, only 16.6% of all musicians were able to work remotely for pay during the pandemic. In contrast, 28.7% of all artists were able to work remotely for pay during the pandemic.

Figure 9



CONCLUSION

Overall, I have defined what it means for an occupation to be volatile and unstable, and the findings are clear: musicians experience much more instability than the average American worker – and even comparable gig workers – in terms of employment, income, and other economic indicators. Making a living wage and finding consistent employment opportunities is very difficult as a musician even under normal conditions, highlighting the problems within the music industry where workers are often unable to find fair compensation for work and regular employment opportunities, competing in a highly saturated market. Not only have musicians experienced worse than average economic difficulties over recent years, but their careers were also further jeopardized due to the effects of the COVID-19 pandemic. The complete shutdown of live performances disrupted the primary revenue stream for most working musicians. Musicians have found it much harder to bounce back from the pandemic than the average American worker and gig worker; in fact, musicians still had not fully recovered from the pandemic's negative effects by the end of 2020. Working remotely or finding alternative employment proved to be difficult for musicians especially. Similarly, musicians were not as able to receive compensation for time out of work due to the pandemic as other occupations, as most musicians are self-employed or working in unstable conditions where they are not able get paid time off from employers as easily. They are also often not provided health care benefits.

As technology advances, I envision a music industry where musicians are able to better leverage their likenesses and are compensated more fairly by streaming services. Reforming the royalty payment structures of popular streaming services could open up another revenue stream for musicians. This could take the burden off of musicians who rely heavily on one or two revenue sources, like live performances or music lessons, both of which are irregular and unpredictable and can lead to periods of little opportunities and low earnings, hurting musicians economically. The ability to make a living wage within the music industry is clearly very difficult due to many intrinsic factors, even prior to the pandemic.

A musicians' labor union that spans across the whole music industry, similar to how the Screen Actors Guild operates, does not currently exist but would drastically increase economic stability for working musicians. A union could help musicians push record labels and venues for higher earnings and allow for more support and stability within the profession. Legislation or government initiatives could then be lobbied for by a union to ensure that streaming services are paying out fair royalties to all musicians. This would help expand the revenue streams of working musicians, allowing them to actually make a living wage off of digital music. These solutions may well be imminent with how quickly things are shifting in the industry, as changes must be made in order to make working as a musician a sustainable career in itself, not just a temporary, tumultuous part-time job.

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